

Memorandum

TO: Sue Sillick, Montana Department of Transportation
FROM: George Mazur, Cambridge Systematics
DATE: January 19, 2009
RE: Contract #308603, Progress Report for December 2008

■ 1.0 Summary

This Progress Report summarizes Cambridge Systematics' (CS) activities and progress on project work tasks and deliverables in support of contract #30863, *Smart Transportation and Land Use Planning*. The project was initiated on September 18, 2008.

■ 2.0 Work Progress and Accomplishments for December 2008

The following bullets describe the work that was undertaken by the CS team during this reporting period.

- Task 1 - The research team completed the identification and assembly of tool examples (subtask 1.3), as well as the review of Montana planning documents and the regulatory context (subtask 1.1). Drafts summaries of all research findings have been developed and are being reviewed internally for eventual incorporation in Tech Memo #1. The web-based survey (subtask 1.2) was finalized, implemented and completed, and summarization of results has begun. As of 12/31/08, work is still *in progress* on all elements of Task 1. These on-going elements of Task 1 will be completed by mid-January, with the exception of the subtask 1.2 and 1.4 interviews; these interviews will now be done concurrently with Task 2, most likely in late January to early February.
- Task 2 - The research team, in consultation with the Technical Panel, has decided to conduct Tasks 1 through 3 concurrently. This month's efforts on Task 2 have included further identification and assessment of potentially well-developed tools from locations outside of Montana, and assembly and cataloging of resource material.
- Task 3 - The research team, in consultation with the Technical Panel, has decided to conduct Tasks 1 through 3 concurrently. However, expenditures have not been incurred in Task 3 as of 12/31/08.
- Task 4 - Work has not initiated on this task.

- Task 5 - Work has not initiated on this task.

■ 3.0 Project Schedule

- The planned and actual time schedule is shown in Table 1. As noted in our October Progress Report, work on Tasks 2 and 3 initiated ahead of schedule on September 18, 2008.

Table 1 – Planned and Actual Time Schedule

Task	Scheduled Start Date	Scheduled Completion Date	Actual Start Date	Actual Completion Date	Percent Work Complete as of 12/31/08	Task Budget	Estimated Expenditures as of 12/31/08	Estimate Percent Expended as of 12/31/08
1. Literature Review and Scan	9/18/2008	1/15/2009	9/18/2008	n/a	55%	\$ 80,328	\$ 48,000	60%
2. Compilation and Analysis	12/15/2008	3/15/2009	9/18/2008	n/a	30%	\$ 46,852	\$ 11,073	24%
3. Gap Analysis	2/15/2009	6/15/2009	9/18/2008	n/a	0%	\$ 39,834	\$ -	0%
4. Stakeholder Engagement and Tool Refinement	4/15/2009	8/15/2009	n/a	n/a	0%	\$ 51,601	\$ -	0%
5. Toolkit Development and Deployment	7/15/2009	10/31/2009*	n/a	n/a	0%	\$ 81,261	\$ -	0%
Project Total						\$ 299,875	\$ 59,073	20%

* Task 5 completion date represents submittal of Draft Project Report.

■ 4.0 Project Issues

- Based on some initial delays in engaging the Technical Panel and implementing the web-based survey, the accelerated completion schedule for Tasks 1 and 2 was not able to be followed. Further, the sequential nature of the web-based survey and interviews in subtask 1.2 create additional scheduling difficulty for Technical Memorandum #1 (TM #1). The research team has recommended a schedule recovery plan that includes rapid completion of TM #1, with interview findings reported in TM #2. The following schedule was communicated to the MDT project managers in late December, 2008:
 - Delivery of TM #1 by January 12, 2009. TM #1 will cover results of Tasks 1.1 and 1.3, and the survey portion of Task 1.2.
 - The interviews, which needed to be conducted subsequent to the survey, will be started on January 26 and included in Tech Memo #2 along with the results of Task 2. Interviews will include select group of Montana's growth communities (Task 1.2) and current tool users (Task 1.4). For Task 1.2, we will send an internal memo on January 19 that presents our suggested interview targets and the interview guide that we propose to use; we anticipate that you will want to share with the Tech Panel and gain their concurrence before they proceed.
 - Target delivery date for TM #2 continues to be March 6, 2009. This date is the same as proposed during kickoff meeting, but could be influenced by ability to schedule and complete interviews

- During kickoff meeting, a potential Technical Panel meeting was discussed to review TM #2 and gain concurrence on the proposed short-list of 10 to 15 "tools". If this plan is maintained, the weeks of March 23 or 30 appear feasible for the next Panel meeting. That Panel meeting would also be a good point to begin discussing the Task 4 stakeholder outreach.
- The target date of May 22, 2009 remains for completion of Task 3 and delivery of TM #3.
- Delivery dates for subsequent items remain unchanged.
- In our estimation, the highest schedule risk in the coming months is related to the interviews and any Panel concurrence points.

■ 5.0 Fiscal Expenditures

- The attached invoice reflects CS and partial subcontractor expenditures through December 31, 2008.
- It is estimated that there are an additional \$7,092 in subconsultant expenditures and travel costs that have either not been invoiced by subconsultants or processed through the CS accounting systems (as of January 6, 2009).
- The total *estimated* expenditure of \$59,073 represents about 20% of total project funds.